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ABSTRACT

A project was conducted to incorporate the Kettering Foundation's National Issues Forums (NIFs) into two senior citizen centers in Pennsylvania. The NIFs provide a process for sharing thoughts and opinions about areas of pressing national concern in an open exchange of all participants' opinions. An inservice training of senior center staff on incorporating NIF concepts and materials into their programs was conducted. The project coordinator worked with center staffs to develop activities to prepare seniors for participation in NIFs. Lecture and discussion with seniors on NIFs were held. Materials used to train staff were Kettering Foundation publications and a NIF starter videotape; materials used with seniors included the NIF videotape, literacy level abridged versions of issue books, and a teaching guide and supplemental materials for moderators, teachers, and tutors. Success of the workshops was documented by increased attendance at the subsequent sessions. The viewpoints, opinions, and problem-solving techniques of participants were enhanced as reflected in the differences between pre- and post-forum ballots. This activity increased the higher-level thinking skills of the seniors and the skills developed were transferable. Self-esteem and empowerment of seniors were also enhanced. (The final report includes training materials for NIF moderator training, pre- and posttests, and a short resource list.) (KC)

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ED 376 347

"National Issues Forums: Seniors/Community Connection"

Final Report

by

Suzanne M. Fisher
'93-'94

June 30, 1994

TIU Adult Education and Job Training Center
MCIDC Plaza, One Belle Avenue, Building #58
Lewistown, PA 17044
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Acknowledgments

We wish to thank the Pennsylvania Department of Education for funding and support of this project.

Funding for "National Issues Forums: Seniors/Community Connection" has allowed us to enhance and develop our programming and delivery of much needed services to our area's adults.

As always we value the support of the Tuscarora Intermediate Unit Board and our Executive Director, Anthony F. Labriola. The Intermediate Unit continues to recognize our unique contribution to the total organization.

A special thanks also to Carlene Hack, Executive Director, Mifflin-Juniata Area Agency on Aging, Inc. for her collaborative efforts on this project. Both she and Renee Long, Senior Center Supervisor, provided valuable technical assistance that greatly support this effort.

Without the team effort of the Senior Center Managers this project could not have succeeded. In addition, we acknowledge the seniors for their willingness and enthusiasm in participating in the Nationals Issues Forums.

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Abstract

Title: National Issues Forums: Seniors/Community Connection
Project No. 98-4010 **Funding:** $ 4937.00
Project Director: Carol Molek
Contact Person: Suzanne M. Fisher Phone No. 717-248-4942

Agency Address: TIU Adult Education and Job Training Center
MCIDC Plaza, One Belle Avenue, Building #58
Lewistown, PA 17044

Purpose:

This project proposed to incorporate the National Issues Forums concept into our senior citizen centers. The National Issues Forums is a process of sharing thoughts and opinions about areas of pressing national concern in an open exchange of everyone's opinion. This activity increased the higher level thinking skills of our seniors and skills obtained were transferable. Self esteem and empowerment of seniors were also enhanced. The project was a coordinated effort between Adult Education and Job Training Center staff, Area Agency on Aging, and the larger community.

Procedures:

An in-service training of AAA staff on incorporating NIF concepts and materials into their programs was conducted. Our coordinator worked with staff to develop activities to prepare seniors for participation in NIFs. Lecture and discussion with seniors on NIF's were held. Materials used to train AAA staff were Kettering Foundation publications: "Building Moderator Skills," Moderating Exercise, and NIF starter video tape. Materials utilized with seniors included the NIF starter video tape, literacy level abridged version of issue books, teaching guide and Supplemental Materials for Moderators, Teachers, and Tutors.

Summary of Findings:

Success of the workshops was documented by increased attendance at the subsequent sessions. The viewpoints, opinions and problem solving techniques of participants were enhanced as reflected in the differences of pre and post forum ballots.

Comments:

While the "National issues Forums: Seniors/Community Connection" workshops proved to be very successful in terms of attendance and participation, the time frame was limited. It is recommended to extend the workshop by one session in order to utilize supplemental materials available from the Kettering Foundation.

Product:

Final report including training materials for NIF moderator training.

National Issues Forums: Seniors/Community Connection

D. Introduction

1. "National Issues Forums: Seniors/Community Connection" addressed priority C. 2.-a small grant to address local needs. This special demonstration project enhanced our Adult Basic Education (ABE) program, served senior citizens in our community, and served as a model for others in the state who see the benefits of incorporating National Issues Forums activities into their curriculum.

The National Issues Forums are sponsored each year by the Kettering Foundation. The Forums are a descendent of the oldest and most characteristic political institution in America, the town meeting. Today our complex democratic government is still dependent on the community being involved. The Forums are one tool of the democratic process. Each year the National Issues Forums convenors identify three issues of pressing national concern for discussion in the Forums and study circles. Books are prepared on two levels: for the general public and an abridged version with a lower reading level. The books and other materials available are used in preparation for the Forums. Participants read the materials and analyze the choices that are presented. The choices require talking through a topic and not just about it. During the Forums participants share their feelings and opinions while learning to be open to others who may have very different viewpoints. The goal is to discover the issue, not to persuade or advocate. Participants are not expected to agree but only to

respect others' opinions. We introduced the National Issues Forums to senior citizens in Mifflin and Juniata Counties and involved them in this process. The National Issues Forums was an invaluable critical thinking skills exercise for these community members. This activity in higher level thinking increased potential for transferring these skills to other areas of their lives. For our seniors this exercise provided stimulation and a Forum for them to express their ideas.

Our community's seniors have been an underserved segment of our population in our Adult Education programs. Although many seniors would benefit from our adult basic education services they are often reluctant to attend. Transportation is also a barrier. This project, located at senior centers, allowed seniors to improve their basic reading and critical thinking skills and allowed us to offer thought provoking experiences to them. Seniors were also empowered by their involvement in National Issues Forums. The essence of the Forums is that each participant's opinion is as important as anyone else's. Therefore the Forums become a self esteem builder. Improving self esteem in our participants is an essential effort in creating receptive learners. Lack of self esteem is a barrier to self improvement. Once a student develops some self confidence and a feeling of self worth learning occurs more naturally. Participation in NIFs is a perfect exercise in honoring and promoting the value of each individual.

This project was fully supported by our local Area Agency on Aging, the agency sponsoring the senior centers. There are 10

centers and the Director has suggested not only holding Forums for the seniors but also to open up the sessions to the community at large. This provided further opportunities for us to involve more people in NIF activities. Very often our seniors become isolated as they get older. Our plan was to bring the community to the senior centers, a line that is not often crossed. This experience was beneficial to everyone involved.

2. Time Schedule - 7/1/93 - 6/30/94

July - October - development of curriculum

November - June - conducted workshops at senior citizen centers

May - conducted NIF training session for Area Agency on Aging Center Managers

June - Final Report

3. Staff

Project Director was Carol Molek. Ms. Molek has over 10 years experience directing adult programs for the IU and developing and implementing special projects. Facilitator for the project was Suzanne Fisher. Ms. Fisher has over 8 years experience working with seniors citizens and has training as an NIF moderator. She has developed a positive relationship with our Area Agency on Aging as instructor for this and previous 353 projects serving our senior citizens.

In addition, AAA staff members contributed to the overall success of the project by embracing the NIF concept.

4. Audience for Report

The audience benefiting from the project were the seniors and AAA staff members. Participation in the NIF provided valuable stimulation to the population. The seniors were able to improve self-esteem which is essential in creating receptive learners. It also allowed the seniors to improve their basic reading and critical thinking skills. The AAA staff members were trained in the NIF concept and process to provide the NIF experience to members of their individual centers.

This project and report will be of benefit to other adult education practitioners who would like to explore ways to better serve their community's senior population.

5. Dissemination

Permanent copies of this report can be obtained from:

Bureau of Adult Basic and Literacy Education Programs
Pennsylvania Department of Education
333 Market Street
Harrisburg, PA 17126-0333

and

AdvancE
Pennsylvania Department of Education
333 Market Street
Harrisburg, PA 17126-0333

"National Issues Forums: Seniors/Community Connection" was administered by the Tuscarora Intermediate Unit No. 11. The TIU is a local education agency which provides educational and management services to 9 school districts and 3 area vocational

technical schools in Fulton, Huntingdon, Juniata and Mifflin Counties.

The Intermediate Unit operates or oversees all Adult Center programs at the TIU Adult Education and Job Training Center. Center programs have included 306/322 ABE and GED programs; ACT 143 Program; the GED Alumni Association; various JTPA Programs; Carl Perkins project for single parents and displaced homemakers and 43 310/353 special projects.

"National Issues Forums: Seniors/Community Connection" was presented at two senior citizen centers. One workshop was located at the Atkinson Mills Senior Center (Mifflin County), and the second was located at the McAlisterville Center (Juniata County).

a. Statement of Problem

"National Issues Forums: Seniors/Community Connection" addressed priority C. 2. - a small grant to address local needs. This special demonstration project enhanced our Adult Basic Education (ABE) program, served senior citizens in our community, and also served as a model for others in the state who see the benefits of incorporating National Issues Forums activities into their curriculum.

Our plan for this project was to introduce the National Issues Forums to senior citizens in Mifflin and Juniata Counties and to involve them in this process. The National Issues Forums was an invaluable critical thinking skills exercise for these community members. This activity in higher level thinking increased

potential for transferring these skills to other areas of their lives. For our seniors this exercise provided stimulation and a Forum for them to express their ideas.

b. Goals and Objectives

1) to introduce the National Issues Forums concept to seniors in Mifflin and Juniata Senior Centers throughout the 93-94 year providing mini-forum experiences. Benefits of seniors' participation will be enhancement of critical thinking skills, organizational skills, communication skills, and human relation skills. Pre and post assessments will measure gains in knowledge. Questionnaires will measure personal assessment of the NIF experience.

2) to provide at least 3 forums at senior centers that are open to the community

3) to document this process through a final report which can then be used statewide for a model of National Issues Forums encouraging seniors' participation in community forums.

c. Procedures

The general design for "National Issues Forums: Seniors/Community Connection" involved three steps:

The first step was to work with instructors to plan an introduction of National Issues Forums for seniors. A presentation on the National Issues Forums experience was prepared and used with all seniors. This lesson was developed by Adult Education and Job Training Center staff with input from volunteers and staff of the Area Agency on Aging. Our staff met with Area Agency on

Aging staff to provide them with an introduction to NIF's and some practice exercises. In addition, our staff's trained moderators instructed the Area Agency on Aging personnel on moderation techniques and procedures to motivate participants in the Forums. With this familiarization to the NIF concept and moderation techniques, Area Agency on Aging may be able to incorporate this approach in other areas of their work with their senior clientele.

The second step was to hold introductory sessions for seniors to orient them to the NIF concept. We then scheduled Forums: one each in Juniata County and Mifflin County. These Forums were also open to the community. We publicized and promoted these events through various media and through community groups and agencies. After the Forums our hope was that Area Agency on Aging personnel would feel comfortable enough to continue NIF activities with their participants. We would also hope that there would be transference between our Center's adult basic education programs and our contacts made through the Forums at the Senior Centers.

The coordinator of the program developed a specific list of project procedures and a detailed time frame to meet project goals. She was responsible for each step of the program's development. However, a project such as this is definitely a team effort. Both our Center staff and Area Agency on Aging staff participated as well as the community at large. In addition, this is an excellent program to eliminate arbitrary student-teacher roles. The senior participants very much became part of the team

reflecting the democratic backbone of NIFs. As an equalizer, the Forums program did much to generate enthusiasm and motivation throughout all our programs.

d. Results

Objective #1

To introduce National Issues Forums concept to senior citizens and staff of the Mifflin-Juniata Area Agency on Aging through mini forum activities developed by our staff.

We were very successful in meeting this objective. Several meetings were conducted with Renee Long, Senior Citizen Center Supervisor, to determine specific NIF topics to be discussed at individual centers, to arrange a training session for AAA staff and identify specific center sites to offer the NIF experience.

The training session for the AAA staff members was well received. The mini-forum activities were held two days to one week prior to the NIF at each center. Seniors were introduced to the NIF concept through the use of a video, and ice breaker activities.

Objective #2

To hold the National Issues Forums for seniors with community involvement.

This objective was adapted to the needs and schedules of the AAA Senior Centers. Two NIFs were offered at a senior citizen center - one each in Mifflin and Juniata County. Each Center Manager, however, participated in the training sessions so the NIF experience may be offered in all the senior citizen centers.

At both centers the community at large had been invited and several chose to participate in the National Issues Forum.

Objective #3

To document and disseminate this Project statewide as a model for other programs to incorporate NIF activities.

This project is documented with the final report available for dissemination through:

Bureau of Adult Basic and Literacy Education Programs
Pennsylvania Department of Education
333 Market Street
Harrisburg, PA 17126-0333

Specific questions should be directed to:

Carol Molek/Suzanne M. Fisher
TIU Adult Education and Job Training Center
MCIDC Plaza, Building #58, One Belle Avenue
Lewistown, PA 17044
(717) 248-4942

f. Evaluation

Evaluation was a continual process. Measurement of success was based on:

-introducing the National Issues Forums concept to over 30 seniors in mini-forums.

-a pre and post test used to assess retention of NIF topic content

-a questionnaire used to assess understanding of the NIF concept and response to this process

-operating 2 forums with community participation.

-production of a final report incorporating the planning and the delivery process of this service for others to duplicate.

g. Dissemination

"National Issues Forums: Seniors/Community Connection" was coordinated with the staff and clients of the Mifflin-Juniata Area Agency on Aging. The project was a joint effort to involve staff and clients in NIF experiences in order to enhance their basic skills and community involvement.

Dissemination is conducted through the Area Agency on Aging, TIU, Pennsylvania Department of Education and AdvancE and the regional staff development centers. Further dissemination will be in coordination with WPSX's "Center for Instructional Design and Interactive Video." This WPSX department has developed a statewide NIF network as a result of a 353 project. By establishing communication with this network and sharing our project's results the NIF concept will be strengthened statewide.

Conclusions and Recommendations

"National Issues Forums: Seniors/Community Connection" was a highly successful project. The sessions were particularly helpful for seniors as 1) an invaluable critical thinking skills exercise; 2) increasing potential for transferring these skills to other areas of their lives; 3) providing stimulation and a Forum for them to express their ideas. A further benefit of the project was enhancing self-esteem through participation in the forum setting.

A recommendation would be that the warm-up session be held in the same week as the actual mini-forum. Having the two sessions close together enhanced participation as it remained current with the seniors.

Appendices

Resources
Pre and Post Test
Curriculum
Publicity

Resources

Resources

Handouts from Kettering:

Building Moderator Skills
Guidelines
Planning
Moderating Exercises
NIF - Moderator's Guide
Supplemental Material for Moderators, Teachers, and Tutor, Starter video

Forlizzi, Lori. The Boundaries of Free Speech: How Free is Too Free? Dubuque, Iowa: Kendall/Hunt Publishing Company, 1991.

Tibbetts, Else. The Health Care Cost Explosion: Why It's So Serious, What Should be Done. Dubuque, Iowa: Kendall/Hunt Publishing Company, 1993.

Pre and Post Test

Pre-Forum Ballot

The Health Care Cost Explosion: Why It's So Serious, What Should Be Done

People get involved in National Issues Forums partly because they want leaders to know how they feel about the issues. Each year, NIF reports what you say to local and national leaders. Please answer the questions below BEFORE you read this book. But before answering the questions, make up a three-digit number. Write it on the line below. When you have answered the questions, please give this form to your Forum leader. Or mail it to National Issues Forums, 100 Commons Road, Dayton, Ohio 45459-2777.

Fill in your three-digit number here. _____

1. How concerned are you about the following?	Very	Somewhat	Not Very	Not At All	Not Sure
a. The increasing cost of health care in the U.S.	☐	☐	☐	☐	☐
b. What you personally spend on health care for yourself and your family.	☐	☐	☐	☐	☐

2. Here are three reasons for soaring health care costs in this country. How important do you think each one is? Give the most important reason a 1. Give the next most important a 2. Give the third most important a 3.

a. Costs are high because of waste, fraud, and greed. ☐

b. The present system does not provide enough incentives for patients or health professionals to save money. ☐

c. The unlimited use of high-tech drugs and treatments is driving up costs. ☐

3. How do you feel about each of these approaches to reducing rising health care costs?	Favor	Oppose	Not Sure
a. Drug prices should be limited by law, **EVEN IF** that gives drug firms less incentive to develop new products.	☐	☐	☐
b. Health care should be provided largely through prepaid group plans, like HMOs, **EVEN IF** that means less freedom to choose your doctor.	☐	☐	☐
c. We should limit the use of high-cost treatments, **EVEN IF** that means depriving some people of the best possible health care.	☐	☐	☐

3A. Look again at the approaches you **opposed** in Question 3. Are there any you could live with if other people favored those approaches? If so, which one(s)?

a. ☐

b. ☐

c. ☐

4. Here are some views people have about each choice. How do you feel about them?	Agree	Disagree	Not Sure
Choice #1: Plugging the Leaks			
a. We can control health care costs by getting rid of waste, fraud, and high profits.	☐	☐	☐
b. Blaming the cost problem on greed and waste by doctors, hospitals, and drug companies is a way of avoiding hard choices about this issue.	☐	☐	☐
c. Government should limit the amount of money patients and lawyers can get from malpractice suits.	☐	☐	☐
Choice #2: Medical Marketplace			
a. Health care costs can be controlled by creating greater competition at all levels of the health care system.	☐	☐	☐
b. Pushing doctors to economize on health care will encourage them to pay more attention to cost than to quality of care.	☐	☐	☐
c. Government should create health care purchasing groups to help people shop for high-quality health care.	☐	☐	☐
Choice #3: Drawing the Line			
a. We must limit the use of expensive treatments in cases where the costs are greater than the benefits.	☐	☐	☐
b. Rationing medical services is immoral because it deprives many Americans of the chance to live longer.	☐	☐	☐
c. Medicare and Medicaid should not pay for high-cost, low-benefit procedures.	☐	☐	☐

5. Which of these age groups are you in?

- **a.** Under 18 ☐
- **b.** 18 to 29 ☐
- **c.** 30 to 44 ☐
- **d.** 45 to 64 ☐
- **e.** Over 64 ☐

6. Are you a:

- **a.** Man ☐
- **b.** Woman ☐

7. Do you consider yourself:

- **a.** White ☐
- **b.** Black or African-American ☐
- **c.** Hispanic ☐
- **d.** Asian ☐
- **e.** Other (Specify: _____) ☐

8. Have you completed:

- **a.** Grade school or less ☐
- **b.** Some high school ☐
- **c.** High school ☐
- **d.** Vocational/technical school ☐
- **e.** Some college ☐
- **f.** College ☐
- **g.** Postgraduate work ☐

9. Do you live in the:

- **a.** Northeast ☐
- **b.** South ☐
- **c.** Midwest ☐
- **d.** West ☐
- **e.** Southwest ☐

10. What is your ZIP CODE? _____

Post-Forum Ballot

The Health Care Cost Explosion: Why It's So Serious, What Should Be Done

People get involved in National Issues Forums partly because they want leaders to know how they feel about the issues. Each year, NIF reports what you say to local and national leaders. Please answer the questions below AFTER you read this book. Before answering the questions, write the same three-digit number on the line below. When you have answered the questions, please give this form to your Forum leader. Or mail it to National Issues Forums, 100 Commons Road, Dayton, Ohio 45459-2777.

Fill in your three-digit number here. _____

1. How concerned are you about the following?	Very	Somewhat	Not Very	Not At All	Not Sure
a. The increasing cost of health care in the U.S.	☐	☐	☐	☐	☐
b. What you personally spend on health care for yourself and your family.	☐	☐	☐	☐	☐

2. Here are three reasons for soaring health care costs in this country. How important do you think each one is? Give the most important reason a 1. Give the next most important a 2. Give the third most important a 3.

a. Costs are high because of waste, fraud, and greed. ☐

b. The present system does not provide enough incentives for patients or health professionals to save money. ☐

c. The unlimited use of high-tech drugs and treatments is driving up costs. ☐

3. How do you feel about each of these approaches to reducing rising health care costs?	Favor	Oppose	Not Sure
a. Drug prices should be limited by law, **EVEN IF** that gives drug firms less incentive to develop new products.	☐	☐	☐
b. Health care should be provided largely through prepaid group plans, like HMOs, **EVEN IF** that means less freedom to choose your doctor.	☐	☐	☐
c. We should limit the use of high-cost treatments, **EVEN IF** that means depriving some people of the best possible health care.	☐	☐	☐

3A. Look again at the approaches you **opposed** in Question 3. Are there any you could live with if other people favored those approaches? If so, which one(s)?

a. ☐

b. ☐

c. ☐

4. Here are some views people have about each choice. How do you feel about them?	Agree	Disagree	Not Sure
Choice #1: Plugging the Leaks			
a. We can control health care costs by getting rid of waste, fraud, and high profits.	☐	☐	☐
b. Blaming the cost problem on greed and waste by doctors, hospitals, and drug companies is a way of avoiding hard choices about this issue.	☐	☐	☐
c. Government should limit the amount of money patients and lawyers can get from malpractice suits.	☐	☐	☐
Choice #2: Medical Marketplace			
a. Health care costs can be controlled by creating greater competition at all levels of the health care system.	☐	☐	☐
b. Pushing doctors to economize on health care will encourage them to pay more attention to cost than to quality of care.	☐	☐	☐
c. Government should create health care purchasing groups to help people shop for high-quality health care.	☐	☐	☐
Choice #3: Drawing the Line			
a. We must limit the use of expensive treatments in cases where the costs are greater than the benefits.	☐	☐	☐
b. Rationing medical services is immoral because it deprives many Americans of the chance to live longer.	☐	☐	☐
c. Medicare and Medicaid should not pay for high-cost, low-benefit procedures.	☐	☐	☐

5. Now that you have talked about health care costs in the U.S., has your understanding of this issue:

- **a.** Increased a lot ☐
- **b.** Increased a little ☐
- **c.** Not increased at all ☐
- **d.** Not sure ☐

6. Has your understanding of **other people's** views on this issue:

- **a.** Increased a lot ☐
- **b.** Increased a little ☐
- **c.** Not increased at all ☐
- **d.** Not sure ☐

5A. If your understanding has increased at all, in what ways has it increased?

6A. If your understanding of **other people's** views has increased at all, in what ways has it increased?

7. What is your ZIP CODE? _____

Training Packet

GUIDELINES FOR OUR FORUMS

- The moderator will guide the discussion yet remain neutral.
- Everyone is encouraged to participate.
- No one or two individuals dominate.
- The discussion will focus on the choices.
- All the major choices or positions on the issues are considered.
- An atmosphere for discussion and analysis of alternatives is maintained.
- We listen to each other.

Planning the Study Circle

Who will attend the study circle? What size will your group be?

How will they be prepared?

How much time will you allow? How many study circles on each issue? Remember that working through issues takes time. (People need to get information via the books, tapes, and speakers. They need a chance to discuss the information after they have been introduced to it and had a chance to reflect on it.)

Where will you meet? (Find an environment that is conducive to hearing and seeing well and where people will feel comfortable and welcome.)

What special arrangements will be necessary? Will you want to use the video starter tape? Do you have the equipment?

What other issues are important to consider?

MODERATING EXERCISE

I. PREPARATION:

Prior to this exercise, participants will have done the following:

- Taken part in a Forum/study circle with an experienced moderator.
- Been introduced to the basic concepts of NIF.

(On Monday morning after the study circle, tell participants that they will have an opportunity to moderate the Forum/study circle the next day. Ask them to think as they read their issue book about how they would moderate the discussion. Point out the checklists, questions, and characteristics of success in the handbook and ask that they study them before the homeroom session on Tuesday.

II. THE EXERCISE:

When you present this exercise, participants will be interested in volunteering if they see they are only responsible for one segment. You can begin by asking for volunteers to sign up to be observers and then move on to asking for moderators.

Emphasize:

- NIF choice work is hard work
- No one "right" way
- Have to feel comfortable using your own words and style
- But there are some essentials if we want to promote deliberation not debate

Sign Up Sheet for the Exercise

Moderator 1	**Role:**	**Observers**
Name _____	Explains the purposes Introduces the choices Leads the icebreaker (Participants relate personal experiences)	Name _____ Name _____
Moderator 2*	**Role:**	**Observers**
Name 2A_____	Encourages deliberation by working through the pros and cons of choices	Name _____ Name _____
Name 2B_____		
Name 2C_____		
Name 2D_____		
Moderator 3	**Role:**	**Observers**
Name _____	Brings closure by engaging group in describing its conclusions	Name _____ Name _____

* You can have several people do this section by having a different volunteer moderate each of the choices.

During the Forum/study circle, the faculty keeps track of the time so that the last moderator has enough time to close the study circle.

After the Forum/study circle is over, the moderators discuss their reactions to moderating. Then the observers share their notes emphasizing the things that the moderators and the participants did that helped the group do choice work. The faculty and other participants add their observations. (Included is a list of guidelines for the observers.)

After people have shared their observations, the faculty asks the group to reflect on what happened in relation to these characteristics of successful choice work.

A. They will be able to describe what they did at each step. They will be able to describe not just their preferences but the conclusions of the group as a whole.

   They will be able to represent what happened in the group in public voice.

B. They will have moved from individual opinions to more shared and reflective judgments.

C. They will know the parameters of politically supportable action.

The purpose of this exercise is to give the participants a chance to practice the moderator role and receive some feedback. This exercise should help them focus on what they need to work on when they moderate back home.

WHAT MODERATORS MUST DO (A Checklist for Observers)

Opening

- Explain purpose
- Describe problem
- Explain choices (bring out distinct difference in points of view)
- Set ground rules
- Bring out personal experiences to connect the public issue with private lives

Deliberation on Choices

- Ask questions to bring out pros and cons, costs and benefits of each choice
- Make sure that participants have a chance to hear what others think of the pros and cons
- Probe for how pros and cons affect what is most valued or feared
- Remind group of strategic facts they may be overlooking
- Call attention to contradictions in positions

Closure

- Ask questions to engage participants in describing the conclusions reached by the group as a whole.
- Ask questions to challenge participants to say how they would represent what happened in the group to a policymaker.

WHAT PARTICIPANTS MUST DO (A Checklist for Observers)

1. Understand all the options
2. Consider consequences of all the options on what they most value
3. Hear what others think about the pros and cons, cost and benefits, of each option
4. Acknowledge contradictions in their positions
5. Take into account strategic facts relevant to the issue

IF PEOPLE HAVE DONE CHOICE WORK SUCCESSFULLY

A. They will be able to describe what they did at each step. They will be able to describe not just their preferences but the conclusions of the group as a whole.

They will be able to represent what happened in the group in public voice.

B. They will have moved from individual opinions to more shared and reflective judgments.

C. They will know the parameters of politically supportable action.

EXAMPLES OF QUESTIONS TO CHALLENGE DELIBERATION BY WORKING THROUGH THE PROS AND CONS OF CHOICES

- Could anyone make an argument against that choice?
- Could anyone make an argument for that choice?
- Why is that course of action important to you?
- What do you fear losing if we take that course of action
- Are there negative consequences of that course of action?
- When you consider this strategic fact, do you think differently about that choice?
- How do you reconcile that statement with what you (or some other participant) said about choice 1?

EXAMPLES OF QUESTIONS THAT EVOKE A DESCRIPTION OF THE NEW GROUND CREATED BY THE FORUM

- How would you describe the conclusions of this group?
- What would you say to a policymaker or a reporter about what happened in the group?
- What actions would you support as a group?
- What actions would you definitely not support as a group?

From "Building Moderator Skills"

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3. Define Roles:

MODERATOR'S ROLE

- Be neutral.

  Do not evaluate other's ideas, take sides, or contribute your own position.

  Make sure most everyone participates and that one or two do not dominate.

  Help your group stay focused on the issues.

  Be aware of when to move the group from one part of the discussion to the next.

  Get the group to consider all essential facts from the issue books for each choice. Each position must get a fair hearing.

  Use questions to move the discussions by bringing in facts where irrelevancies or misstatements have been introduced.

  Draw out and clarify the values participants associate with the facts.

  Make sure no one looks stupid, that all comments are validated.

- Don't talk too much or allow the group to make you the expert.

BUILDING

MODERATOR

SKILLS

MODERATOR TRAINING

PURPOSE/GOALS

- To help you develop your moderator skills
- To provide you with a guidebook and silent coach after training
- To help you continue your development as a moderator by reviewing and assessing your skills as you practice them.

UNDERSTANDING AND COORDINATING CONVENOR AND MODERATOR ROLES AND RESPONSIBILITIES

Two persons are integral to successful local forums:

The **convenor** (or coordinator) is the key person in your community or organization for planning and carrying out the local NIF activities in your community.

The **moderator** (or group leader/facilitator) is the person who is responsible for actually conducting the local forum/study circle.

The convenor's role includes:

Creating a steering committee

*Designing a plan. Deciding on a format for your forum(s), schedule of activities, assignment of responsibilities, publicity, staffing requirements, materials, facilities, budget, and a plan for evaluation and assessment as well as communicating results to policymakers.

Selecting moderators and developing a moderator training program.

*The moderator will work closely with the convenor and the steering committee in developing the format for the forum.

BEFORE THE FORUM

MODERATOR ROLE

- Decide with the convenor whether you will have a forum or a study circle.
- Taking into account the size of the group, develop a time frame that includes time for opening the discussion, conducting an icebreaker, holding the discussion, and the closing.
- How will people get the information they will need for the discussion? Can you assume they will have read the materials? Will you use the starter tape? Resource people?
- How will you keep track of the discussion? Will you use a recorder to keep a visible group memory on a flip chart? Or will someone take notes?
- Meet with the recorder or resource people if you use them so their roles are clear.
- Prepare by reading the issue book thoroughly. Develop an icebreaker and questions for moving the discussion.
- Prepare the room, creating an environment for good discussion and comfort—so people can see and hear each other.
- Post the choices where people can see them.
- Welcome people as they arrive.

POSSIBLE SEQUENCE OF EVENTS IN A FORUM

Have people fill out questionnaires

Welcome
- Introductions

Opening
- Ground Rules
- Icebreaker
- Starter Tape

Forum Discussion

Closing the Forum
- Questionnaires

(Evaluating the Forum) optional

OPENING THE FORUM

Purpose and Ground Rules

The moderator sets the context for the discussion, by explaining the purpose of the forum, the outcomes desired, the time frame and logistics, the ground rules for the discussion, and the roles the moderator(s), recorder(s), and participants will play. Taking time to explain each of these aspects to the group will help ensure success of the forum.

There is an important principle about opening meetings

"You need to go slow to go fast"

—that is you need to build understanding about how the forum will be conducted. It is part of the moderator's role in educating the group about the difference in this kind of conversation and should not be rushed. There are three kinds of ground rules that need to be emphasized. They deal with: 1) the subject or purpose of the discussion, 2) the process or approach that will be used, and 3) the roles participants will play. Use your own words to describe the following principles:

1. **Purpose of the Forum—Describe the issue for discussion—We suggest having the choices posted in the room.**

2. **Give a short, clear description of the NIF process—such as NIF discussions are a...**

   Process of discovery—of finding common ground and differences

   Listening to new ideas and perspectives

   Looking at choices

   Working through
   - **clarifying values, and**
   - **moving towards choices you can live with**

   It is not a debate.

   It is not a consensus-forming process.

It may be helpful to also say what participants should be able to do at the end of the session:

AFTER OUR FORUM EVERYONE SHOULD BE ABLE TO:

Identify the range of realistic alternatives and move toward a choice;

Make a good case for those positions one dislikes as well as the position one likes;

Consider choices one has not considered before;

Understand others have reasons for their choices and that their reasons are very interesting, not dumb, unreasonable or immoral;

Realize one's own knowledge is not complete until one understands why others feel the way they do about the choices;

Consider the underlying values of each choice; and,

Leave the forum/study circle "stewing" over the choices.

3. Define Roles:

MODERATOR'S ROLE

Be neutral.

Do not evaluate other's ideas, take sides, or contribute your own position.

Make sure most everyone participates and that one or two do not dominate.

Help your group stay focused on the issues.

Be aware of when to move the group from one part of the discussion to the next.

Get the group to consider all essential facts from the issue books for each choice. Each position must get a fair hearing.

Use questions to move the discussions by bringing in facts where irrelevancies or misstatements have been introduced.

Draw out and clarify the values participants associate with the facts.

Make sure no one looks stupid, that all comments are validated.

Don't talk too much or allow the group to make you the expert.

RECORDER'S ROLE

Be neutral, do not evaluate ideas or contribute own ideas.

Provide visible group memory.

Summarize and organize, using speaker's key words.

Watch conversation for clarifying comments, comments that move conversation; and comments that stop conversation.

PARTICIPANT'S ROLE

Focus attention on the issue being discussed.

Be sure to talk about feelings and values as well as facts.

Contribute your ideas to the discussion.

Listen actively.

Allow others to complete their thoughts before speaking

If uncertain of others' meaning, ask.

Consciously work at redefining your perspectives and clarifying your values, with the help of others, so as to move toward possible choices.

Come to the forum having read the materials.

ICEBREAKERS

An effective icebreaker is important because it can establish, from the very beginning, the right tone and direction; and it can introduce participants to each other so that this is not a conversation among strangers.

A good icebreaker:

Is brief (maximum—10 minutes)

Helps each person focus on his or her view of the issue to be discussed.

Helps "concretize" the issue, looking at it as it is experienced in the ordinary lives of people.

Gives people a chance to talk about their "story"—real life situations and values they bring to this conversation.

Gets people in touch with the Issue through listening to individual stories and seeing them as parts of a larger whole.

Establishes story-telling as important and serious.

This story-telling mode prepares for the choice work of the Forum by recognizing a complex world where black and white, clear-cut distinctions are inadequate in formulating courses of action related to public issues. In a forum format it can be used to get participants talking together in pairs or triads, which establishes the essential form of the Forums as that of a conversation which begins among a few and grows to talk to ,and with ,many.

A good icebreaker can be a means for the moderator to accomplish two things:

1. Establish a climate for people to get in touch with what they believe personally and then feel free to engage in serious talk with others about personal views and values;

2. Take the focus from the government to the people, and validate participants' experiences and values as a sound basis for serious talk about the issue.

Both of the above are important (essential?) prerequisites for the choice work involved in these public conversations.

- Hypothetical situation
  discuss of partner
  (ie. How would you feel if you found out a co-worker had AIDS?)
  - Has this issue affected you personally (community, family, etc.)
  - Bring to personal level

ICEBREAKER EXERCISE

Develop an exercise to start a forum based on the foregoing principles.

DEVELOPING DISCUSSION QUESTIONS

The following exercise is designed to give you practice in the skill of asking questions. In formulating your questions, use the issue book chosen for the moderator training workshop.

1. **FORMULATE a question which would help participants consider the consequences of a view given in the issue book.**

   ~~#~~

2. **HOW might you phrase a question or comment to encourage the telling of personal stories to help participants look at the "real life" meaning of the statistics or bare facts of an issue?**

   How would your life change if you were suddenly out of a job because of technological changes in your workplace? (ie computerization)

3. **FORMULATE a question which would encourage disagreement among participants as a sound basis and starting point for the "choice work" of the forum:**

   Would you rather spend your tax $ on upgrading basic skills or improving hi-tech?

4. **PHRASE a question to help forum participants create another "choice" or "view" from the ones presented in the NIF book:**

   How can our view of our work & basic skills training affect our democratic, legislative process?

5. **FORMULATE a question or comment to develop cross-comparisons between the different views of the issue in the NIF book (e.g., costs and benefits implicit in the different views):**

   - Would you support a tax ↑ to support basic/start our tax incentive to industry for training?
   - Would you cut social spending, ↑ the language for Allophones or spend tax $ on math courses?

6. **HOW could you ask a question to move participants to consider the values implicit in their comments?**

   I hear you saying that you value the work ethic, but what of the work/ability

7. **WHAT question might help participants move toward finding "common ground"?**

_____

_____

8. **WHAT WOULD YOU CONSIDER—**

a superb opening question?

_____

_____

a dynamite question to turn the discussion from opinion-sharing to choice work?

_____

_____

a way to end a forum which has gone in many directions without achieving much common ground in the time alloted?

_____

_____

EDIT YOURSELF

Are your questions open-ended ones to which there is a possibility of more than one simple answer?

Do your questions tend to be in one category only, such as mostly about facts? or values only? or personal stories?

Is there a hidden agenda, an answer YOU have in mind beneath your questions?

Ask: Will this question help clarify or lead us further?

A dynamic discussion is a voyage of discovery for both moderator and participants. The best moderators AVOID THE FOLLOWING:

THE DEBATE APPROACH OF "Do you agree? disagree?"

THE ANECDOTAL APPROACH of always asking "What is your experience?" or "Does anyone else have a similar story?"

THE VALUE OR JUDGMENT APPROACH in which questions are asked with loaded adjectives inserting values into the facts.

A SAMPLING OF MODERATOR RESPONSES FOR...

INSURING THAT ALL CHOICES GET A FAIR HEARING:

Is there any way you disagree (agree) with option #2?

Let's state all the ways we agree (disagree) with option #1

We want to explore as many aspects of these options as we can. What other alternatives were brought out in the tape or issues book on this option?

Rule play: ask someone to put themselves in the position of_____and tell their story.

What values seem implicit in this option? Are any of them conflicting?

Do we need more time to understand this position? Let's go back and take a fresh look. Will someone restate what we've said about this?

STIMULATING DISCUSSION

What do others think about this?

What ideas have not been expressed?

What is your sense of how we ought to...?

Let's assume....What would you do?

STIMULATING DISCUSSION (CONT'D)

How do you react to that? (In response to what someone has said with emphasis)

What arguments do those who differ want to bring out?

How does this touch the lives of people in your neighborhood/workplace?

How would you respond to the concerns just expressed?

I can see you have very strong feelings about this and you want to be sure to make the point.

Do we all have a feeling of uncertainty at this point? What might that mean?

PERCEPTION CHECKING

Let me check this out. I heard you say....

Let me ask if I'm hearing you correctly.

One suggestion is that.... Another suggestion was.... A third response....

These are the responses I'm hearing. What do you wish to add?

DEALING WITH A DOMINATING PARTICIPANT

We want everyone to participate, so let's check with others before I get back to you.

Your point has been noted on the board, but let's see what others think about this.

Let's review the ground rules, are we following them?

This disagreement shows the diversity of feeling. Let's ask others to comment.

I'm not sure that Mrs._____got to make her point, let's have her finish this point.

SUMMARIZING

Let me see how I've heard things.

What's your sense now? What new insights?

We raised some interesting issues. Let's see what we can pull out to think about....

Can someone suggest areas that we seem to have in common?

Who all should we be talking with? Policymakers? Neighbors?

CLOSING THE FORUM

It is important to give participants a sense of closure to the forum, to let them discuss next steps, and to thank them for their participation. This can be done in different ways.

Some ways are:

Asking each person to give his or her view.

Ask someone to summarize and others to add to, or comment on the summary.

Ask them what they would say to a policymaker about the outcomes of the discussion.

In concluding, the moderator should review the purpose of the forum, what has been accomplished, and how people can continue to be involved in NIF.

Finally, ask them to fill out the post questionnaire.

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* No need to come to consensus — aware of own feelings + others (awareness!)

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Think of "Harvesting a Public Voice" not as concluding, but as giving meaning to what you are doing. Participants describe the experience they just had, not report results.

AT THE END OF YOUR FORUM, you may want to ask yourselves these questions to reveal the results of your efforts

I. Is there a **shared** understanding of the problem?

II. How does this issue affect what people care about every day? What worries them?

III. What makes this issue so difficult to decide? What is really at issue?

IV. What trade-offs are people willing to make to get what they want? What consequences are unacceptable? What are people **not** willing to give up?

V. Is there enough common ground for action? Is there a shared sense of purpose and direction? What is unresolved?

VI. Where is our community or country, in the process of resolving this issue? Is the current political debate likely to resolve the issue? What have we learned in the forum that we can carry back into the political debate.

HARVESTING IS INTERPRETIVE MORE THAN SUMMARY.

A PRACTICAL WAY TO DO HARVESTING

OPTION 1

What is the shared understanding of the problem?	How does the issue affect what people care about every day? What worries others?	What makes the issue so difficult? What is really at issue?	What consequences are marketable? What are people not willing to give up?

OPTION 2

What do we now know about the problem?	What else do we need to know about the problem?	What is our new perspective toward the problem?	What can we do about the problem?

OPTION 3

How do we now understand the problem?	What is new? What do we now worry about?	What were the issues that made the choice so difficult?	What is it that we have learned that can benefit the community?

OPTION 4

Choose one you feel is best for your group. Modify one of the options, or design your own option.

ENCLOSURES

Excerpts from an informal newsletter, *ACROSS THE FENCE*, Winter 1991. Produced by Nancy Pitts, South Carolina Department of Corrections, P. O. Box 21787, Columbia, SC 29210, 803-737-9494.

Information from Phyllis Emigh, Study Circle Resource Center, Route 169, Box 203, Pomfret, CT 06258, 203-928-2616.

Publicity

VISITS SENIORS -- Suzanne Fisher of Lewistown's Adult Education Job Training Center met with members of the McAlisterville Senior Citizens Center Thursday, June 16 to present a National Issues Forum program entitled 'The Health Care Cost Explosion.'

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